# Chapter 14 – Uniform Assessment Instrument (UAI) Form Version 3

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#### **Important**

The required fields referenced in this chapter refer to system-required fields. These fields are required in order for the form to be saved in approved status.

The information that is required due to policy may be different from those that are system required.

#### **Person Administration Requirements**

Introduction

According to each form, certain fields are required within the Person Administration.

Required Fields for Approved Form Status

**Required Fields** Personal Admin Tab / Name Secondary Tab:

Customer *Legal Name* (First and Last Names)

Date of Birth

SSN

Marital Status

Gender

Veteran

Spouse of Veteran

Receive Veteran Benefits

Ethnicity Race

*Speaks* – Defaults to English *Reads* – Defaults to English

Understands Only - Defaults to English

Address Details Tab:

Needs to have the Address Type of *Residence* 

Street

City

*County* - If out of state - use County "ZZ" *State* - If out of country - use State "ZZ"

Zip

Residence - Rural or Urban

#### **Saving Form**

Each navigational tab (page) must be saved before advancing to the next tab. Once the save is successful the page will automatically forward to the next navigational level tab.

#### **Customer Primary Navigation Tab**

Requirement

Add or update all customer and associate information before you begin.

**Form Reference** 

Page 1 of the Uniform Assessment Instrument (UAI) form.

Main Secondary Navigational Tab



#### **Required Fields**

All fields displayed on this page are required in order to save the assessment as work in progress.

Note

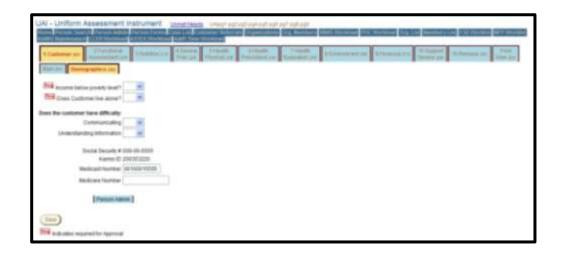
The form status will automatically be placed in Work in Progress status which will be uneditable until the form is saved. Once the form data entry is completed, then switch the Form Status field will be active.

<u>Note</u>: To select an assessor, type in the full or partial name and press enter. A search will be performed and a listing will be displayed. Click on the appropriate Assessors Name to select.



#### **Customer Primary Navigation Tab, Continued**

Demographic Secondary Navigational Tab



#### Required Fields Income below poverty level?

Does customer live alone?

Hint

To update the demographic information on the customer, click on the Customer Maintenance link. This will display the Person Administration Window. On the Person Administration page there will be a link back to the form that can be used when the person information has been updated.

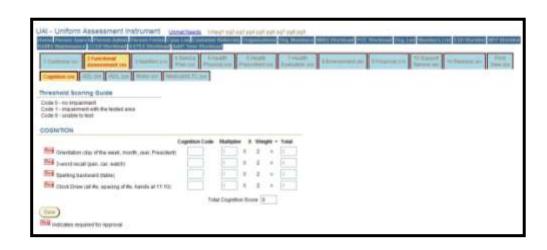


Continued on next page

#### **Functional Assessment Primary Navigation Tab**

**Form** Reference Page 2 of the Uniform Assessment Instrument (UAI) form

Cognition Secondary Navigational Tab



**Required Fields** All fields displayed on this page are required.

Continued on next page

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ADL Secondary Navigational Tab



**Required Fields** All fields displayed on this page are required.

Continued on next page

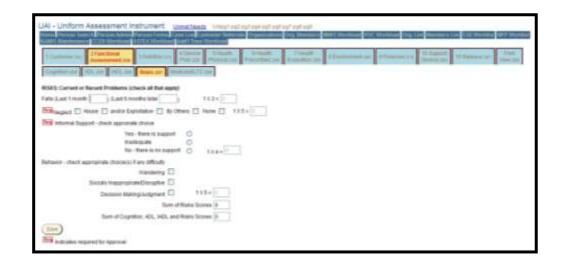
IADL Secondary Navigational Tab



**Required Fields** All fields displayed on this page are required.

Continued on next page

Risks Secondary Navigational Tab

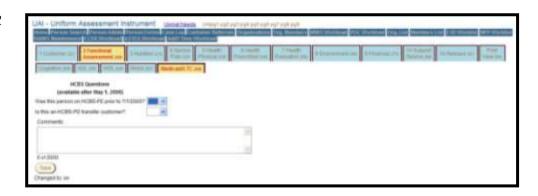


Required Fields Neglect / Abuse / Exploitation

Informal Support

Continued on next page

Medicaid LTC Secondary Navigational Tab



**Required Fields** No fields displayed on this page are required.

#### **Nutrition Primary Navigation Tab**

Form Reference Page 3 of the Uniform Assessment Instrument (UAI) form

Nutrition Risks Secondary Navigational Tab



#### **Required Fields**

At least one item needs to be selected. If none apply, select "Yes" on the last question "Customer does not meet any of the nutrition risk screen indicators."

If any option on the above is answered "Yes" then *Comments* field is required.

#### Hint

Select just the "Yes" on the appropriate questions. Other fields can be left blank. Blank will default to "No" in the database. However, "No" will not be displayed on the form.

Continued on next page

# Nutrition Primary Navigation Tab, Continued

Eating Problems Secondary Navigational Tab

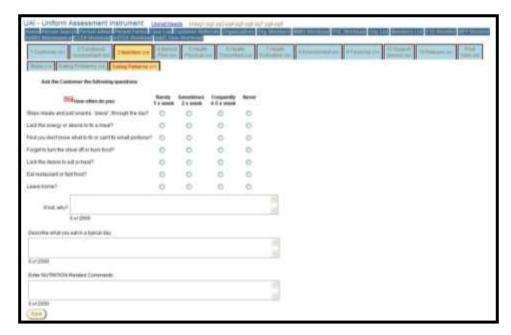


**Required Fields** All fields displayed on this page are required.

Continued on next page

### Nutrition Primary Navigation Tab, Continued

Eating Patterns Secondary Navigational Tab



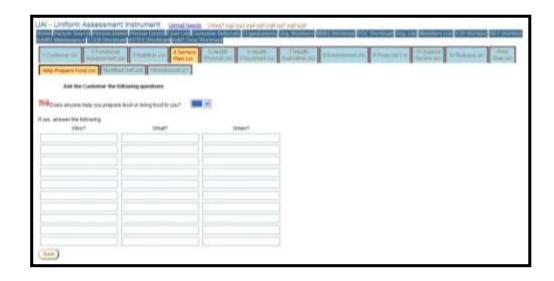
**Required Fields** All fields in the "How Often Do You:" area are required.

If one selection is *Never* the *If not, why?* comment area is required.

### **Service Plan Primary Navigation Tab**

Form Reference Page 4 of the Uniform Assessment Instrument (UAI) form

Help Prepare Food Secondary Navigational Tab



**Required Fields** 

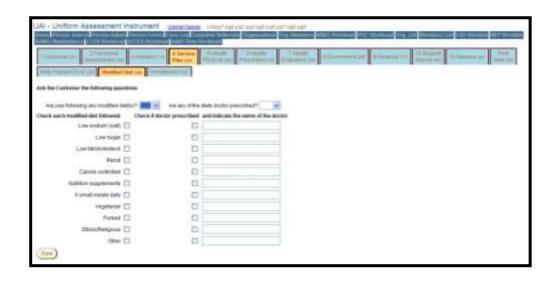
All fields displayed on this page are required.

However, if the answer is "Yes" then Who?; What? and When? are required.

Continued on next page

#### Service Plan Primary Navigation Tab, Continued

Modified Diet Secondary Navigational Tab



**Required Fields** 

All fields displayed on this page are required.

#### Hint

#### If completed:

#### Are you following any modified diet(s)?

If the answer is "yes" then at least one selection in the first column is required for each modified diet followed.

#### Are any of the modified diets doctor prescribed?

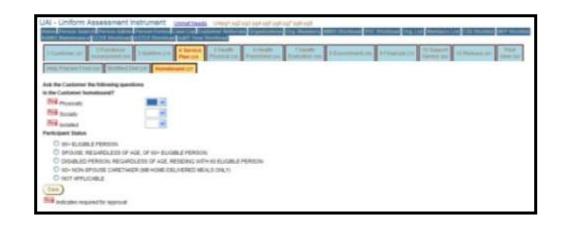
If the answer is "yes" then at least one selection in the second column is required for doctor prescribed modified diets.

If the above is answered "yes" the *Indicate the Name of the Doctor* field is required.

Continued on next page

### Service Plan Primary Navigation Tab, Continued

Homebound **Secondary** Navigational Tab



**Required Fields** All fields displayed on this page are required.

Hint

Participant Status: This area lists all available statuses, some may not be applicable.

Continued on next page

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# **Physical Health Primary Navigation Tab**

Form Reference Page 5 of the Uniform Assessment Instrument (UAI) form.

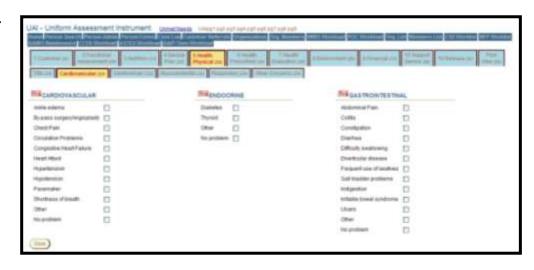
Title Secondary Navigational Tab



**Required Fields** At least on item or "No Problem" on this page is required.

Continued on next page

Cardiovascular Secondary Navigational Tab



**Required Fields** At least on item or "No Problem" on this page is required.

Continued on next page

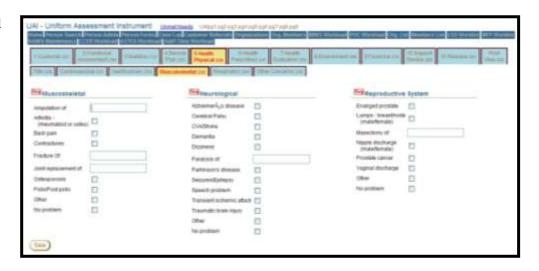
Genitourinary Secondary Navigational Tab



**Required Fields** At least on item or "No Problem" on this page is required.

Continued on next page

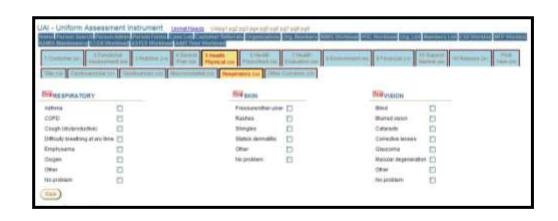
Musculoskeletal Secondary Navigational Tab



**Required Fields** At least on item or "No Problem" on this page is required.

Continued on next page

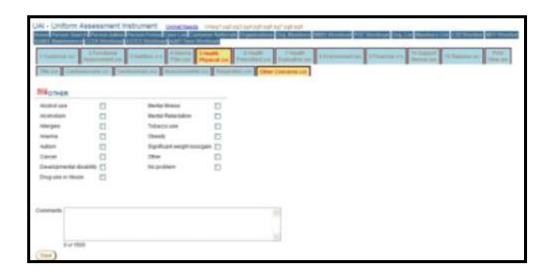
Respiratory Secondary Navigational Tab



**Required Fields** At least on item or "No Problem" on this page is required.

Continued on next page

**Other Health** Concerns Secondary Navigational Tab



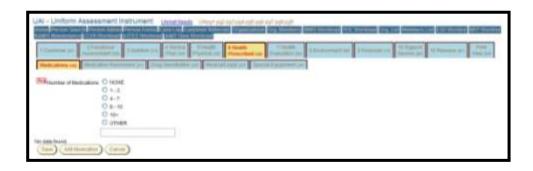
**Required Fields** At least on item or "No Problem" on this page is required.

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#### **Prescribed Health Primary Navigation Tab**

Form Reference Page 6 of the Uniform Assessment Instrument (UAI) form

Medications Secondary Navigational Tab

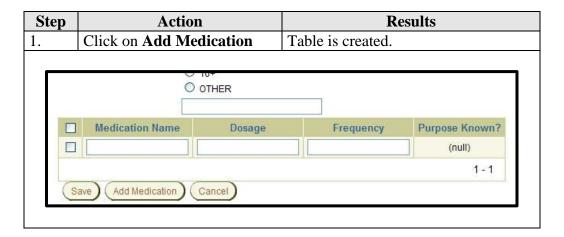


#### Required Fields Number of Medications

However, if Medication is listed all fields are then required. Instructions on how to add and delete the medications from the listing follow.

#### **How To Add Medications**

Follow the steps in the table below to add a medication.



Continued on next page

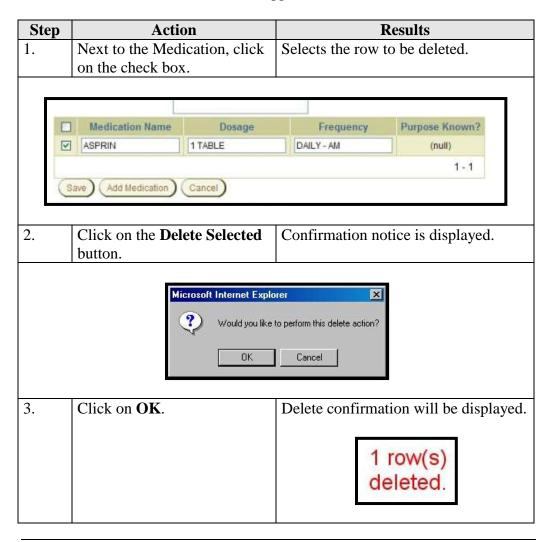
#### How To Add Medications (continued)

Step	Action	Results
2.	Type in Medication, Press	Advances to next field
	Tab	
3.	Type in Dosage, Press <b>Tab</b>	Advances to next field
4.	Type in Frequency, Press	Advances to next field
	Tab	
5.	Click on Save.	Save confirmation will be displayed.
6.	To add another medication,	
	click on the Add Medication	
	button again and return the	
	Steps 2 through 5 above.	

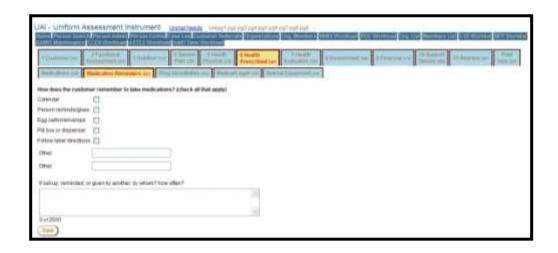
Continued on next page

#### **How To Delete Medications**

Follow the steps in the table below to delete a medication. This can only be done until the assessment is saved as approved.



Medication Reminders Secondary Navigational Tab

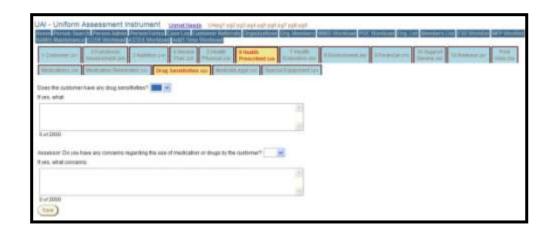


**Required Fields** No fields displayed on this page are required.

<u>Note</u>: If the IADL of Management of Medications, Treatments is scored 2 or above, then the "*If set up, reminded, or given by another, by whom? How often?*" field is required to have at least 10 characters entered.

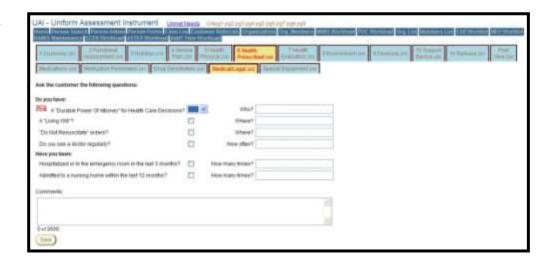
Continued on next page

Drug Sensitivities Secondary Navigational Tab



**Required Fields** No fields displayed on this page are required.

Medical/Legal Secondary Navigational Tab



#### Required Fields Do you have A Durable Power of Attorney for Health Care Decisions?

However, if any questions are checked, then the text field next to the check box is required.

Continued on next page

Special Equipment Secondary Navigational Tab



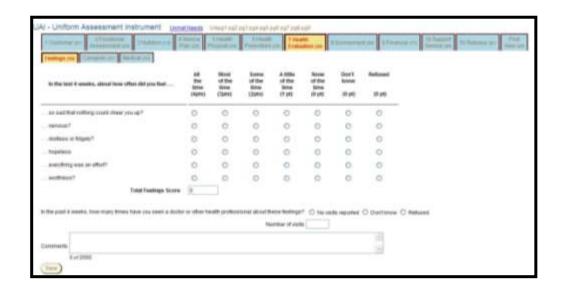
**Required Fields** No fields displayed on this page are required.

Continued on next page

#### **Health Evaluation Primary Navigation Tab**

Form Reference Page 7 of the Uniform Assessment Instrument (UAI) form.

Feelings Secondary Navigational Tab

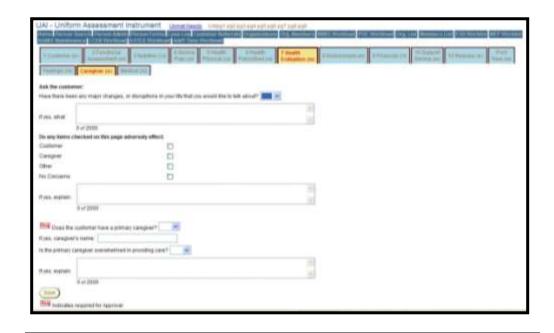


**Required Fields** No fields displayed on this page are required.

Continued on next page

#### Health Evaluation Primary Navigation Tab, Continued

Caregiver Secondary Navigational Tab



Required Fields Does the customer have a primary caregiver?

If "Yes", then Is the primary caregiver overwhelmed in providing care?

If "Yes" then *explain* 

Continued on next page

# Health Evaluation Primary Navigation Tab, Continued

Medical Secondary Navigational Tab



**Required Fields** No fields displayed on this page are required.

Continued on next page

#### **Environment Primary Navigation Tab**

Form Reference Page 8 of the Uniform Assessment Instrument (UAI) form

Residence Secondary Navigational Tab

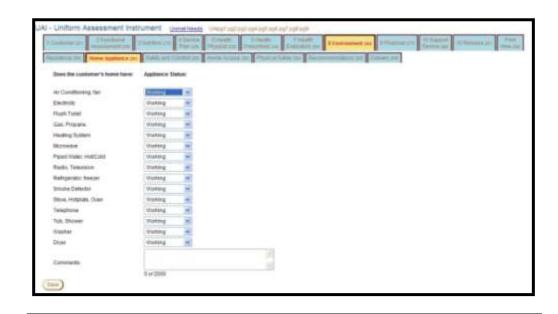


**Required Fields** *Place of Residence:* One option is required.

**Residence Is:** One option is required.

Continued on next page

Home Appliance Secondary Navigational Tab



**Required Fields** No fields displayed on this page are required.

The defaults are listed as "Working".

Continued on next page

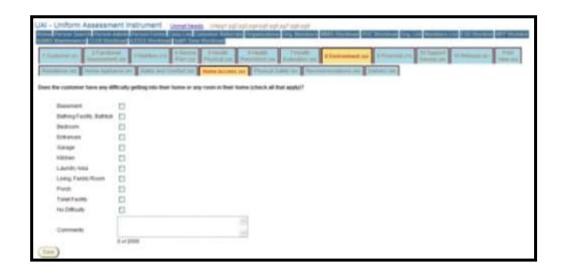
Safety and Comfort Secondary Navigational Tab



**Required Fields** No fields displayed on this page are required.

Continued on next page

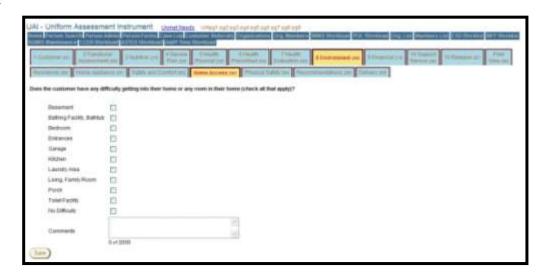
Home Access Secondary Navigational Tab



**Required Fields** No fields displayed on this page are required.

Continued on next page

Physical Safety Secondary Navigational Tab



**Required Fields** No fields displayed on this page are required.

Continued on next page

# **Environment Primary Navigation Tab, Continued**

Recommendations Secondary Navigational Tab

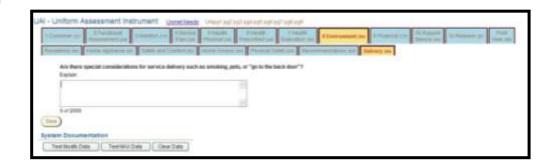


**Required Fields** No fields displayed on this page are required.

Continued on next page

# **Environment Primary Navigation Tab, Continued**

**Delivery Page** Secondary Navigational Tab



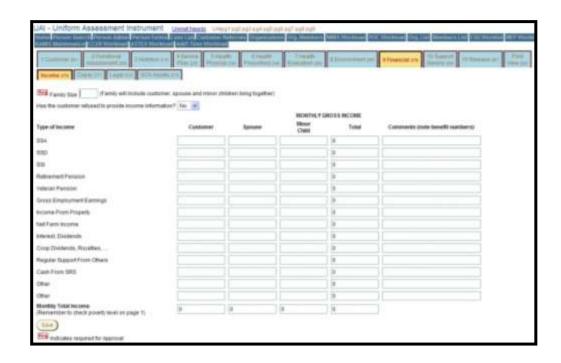
**Required Fields** No fields displayed on this page are required.

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# **Financial Primary Navigation Tab**

Form Reference Page 9 of the Uniform Assessment Instrument (UAI) form.

Income Secondary Navigational Tab



### Required Fields Family Size

Has the customer refused to provide income information?

The default is "No".

*Income* must be entered if the answer to the above question is "No".

Continued on next page

Co-Pay Secondary Navigational Tab

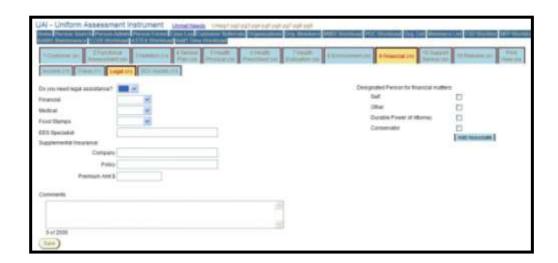


**Required Fields** No fields displayed on this page are required.

Note The SCA Percentage amount will automatically populate to reflect the correct amount after the SCA Assets page is completed, the "Calculate SCA %" button is pressed and the page is saved.

Continued on next page

Legal Secondary Navigational Tab

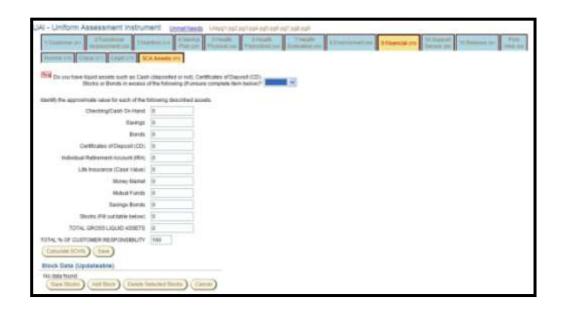


**Required Fields** No fields displayed on this page are required.

**Note** There is an option to add an associate if needed.

Continued on next page

**SCA Assets** Card



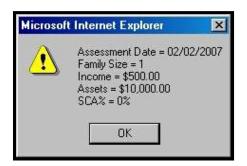
Required Fields Do you have items such as Cash (deposited or not), CD's, Stocks or Bonds in excess of the assets limitation based on family size?

If answered "Yes" then at least one item must be entered.

Calculate SCA % Button must be selected to calculate the SCA Customer Responsibility percentage.

Note

When saving this page a notice regarding all financial information will be displayed. Click on OK and the page will advance to the Support Service tab.



Continued on next page

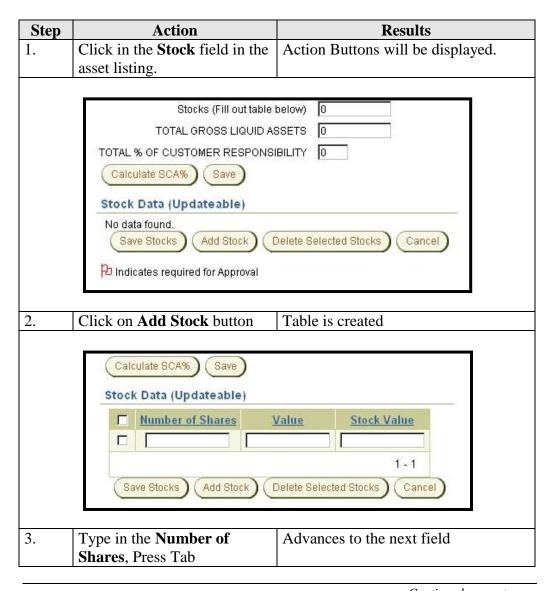
14-41 Updated 5/01/2007

# **Entering Stock Information**

When entering the number of shares of stock that is owned a table will be created. The total of all the stock information entered will appear in the appropriate field in the listing. See the next page for instructions on entering this information.

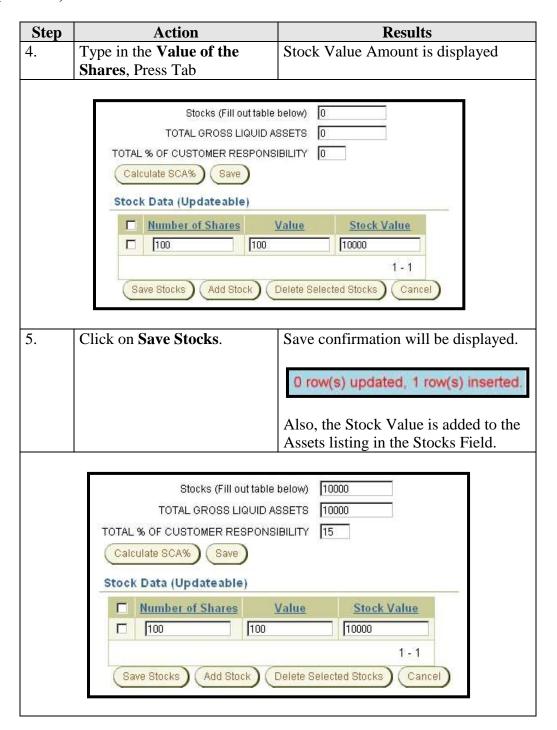
#### How To Add

Under the Stock Data region follow the steps in the table below to add share information.



Continued on next page

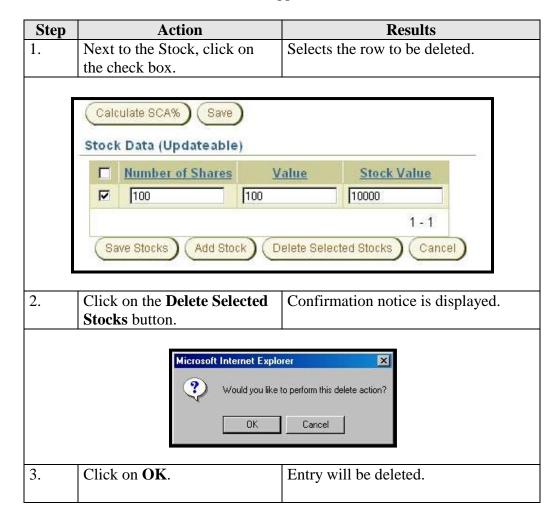
#### How To Add (continued)



Continued on next page

#### **How To Delete**

Follow the steps in the table below to delete a stock entry. This can only be done until the assessment is saved as approved.



# **Support Services Primary Navigation Tab**

Form Reference Page 10 of the Uniform Assessment Instrument (UAI) form.

Support Services Secondary Navigational Tab



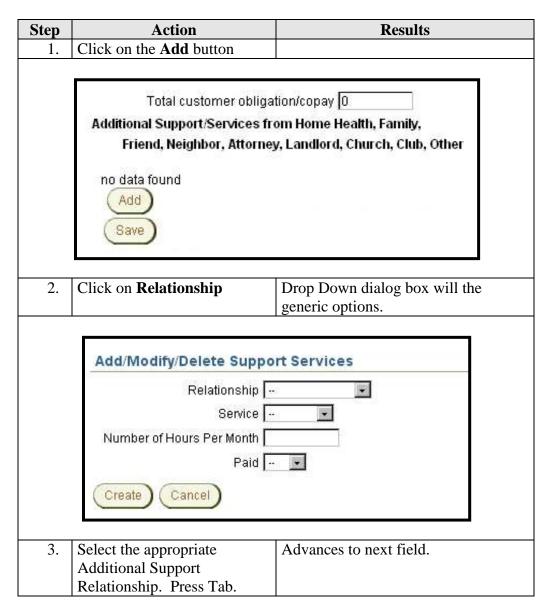
### Required Fields Additional Supports exist?

The remaining fields will be auto populate from the Plan of Care.

Continued on next page

### Support Services Primary Navigation Tab, Continued

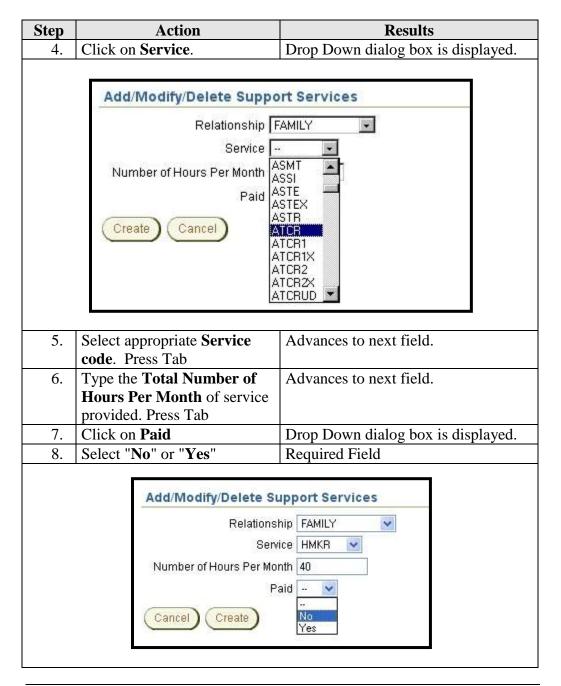
**How To** Follow the steps in the table below to add Support Services information.



Continued on next page

### Support Services Primary Navigation Tab, Continued

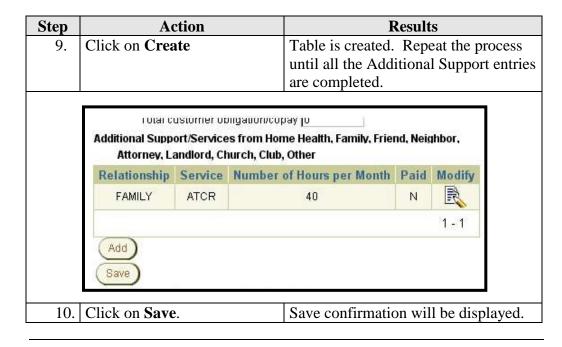
How To (continued)



Continued on next page

# Support Services Primary Navigation Tab, Continued

### How To (continued)



## **Release Primary Navigation Tab**

Form Reference Page 10 of the Uniform Assessment Instrument (UAI) form.

Release Secondary Navigational Tab



**Required Fields** *Release of Information:* Acknowledgement that the form as signed

Who signed the form?

**Hint** Once the Save button is selected, the page will automatically forward to the

Customer Primary Navigation Tab – Main Secondary Navigation Tab so that

the form status can be changed from Work in Progress to Approved.

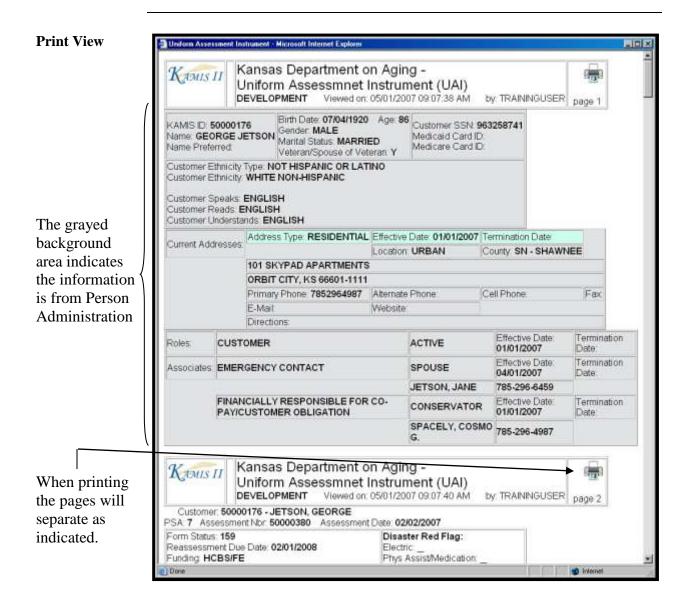
Plan of Care / Unmet Needs For Plan of Care/Unmet Needs entry, see the individual chapters for detailed

instructions.

### **Print View**

#### Form Reference

This tab will give the opportunity to print the assessment information in its entirety. The format will not be in the same arrangement as the form, but it will be divided into sections of information according to the paper form. This will open in a separate window from the assessment.

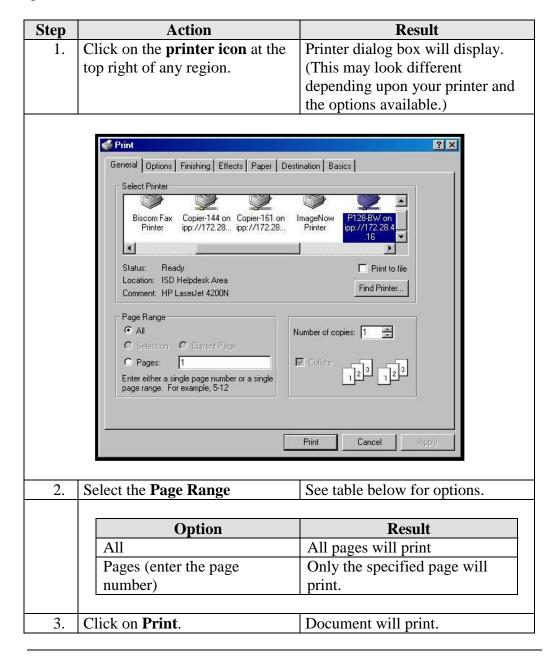


Continued on next page

### Print View, Continued

#### **To Print**

Follow the steps in the table below to complete the Customer Referral process.



#### To Close

The window can be closed by clicking on the  $\boxtimes$  in the right upper corner.